Preferences, Proxies, and Document Sharing

(3/2003)

It is possible to edit certain defaults for your requisitions so they always enter into a given field without you having to use the look-up feature or punch them in manually. It is also possible to grant access to other users to act as your back-up when you are out of the office. This instruction manual will walk you through how to do both.

1. Welcome Page

Choose "Preferences"

2. Preferences Menu

Choose "Defaults" and then go to the next page of this manual.

3. Preferences Editing Page

Choose "Edit"

Preferences

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Defaults Summary

Originating Office Code:	None
Issuing Office Code:	None
Ship To Office Code:	CHEMICAL SAFETY
Name:	CHEMICAL SAFETY
Address:	2175 K STREET, NW
	SUITE 400
City:	WASHINGTON
State:	DC
Zip:	20037-1809
Country:	US
Phone:	202-261-7600
Fax:	202-261-7650

Mark For Office:	None
Admin Office Code:	ORACLE
Name:	oracle
State:	
Zip:	
Country:	

4. Looking up Defaults

Click Submit to save your data.

Defaults Edit

Originating Office:	
Issue Office:	
Ship To Office:	CHEMICAL SAFETY
Mark For Office:	
Admin Office:	ORACLE
Payment Office:	ARC/ASD/PRB
Invoice Office:	

Organization: CSB

Submit   Cancel

Click on the look-up button next the field you want to choose a default for, and then go to the next page of this manual.

5. Choose a value.

Remember if you do not see the value you want to choose. You may search for a value using the search criteria drop down list, then enter the value next to "For:", then hit display.

Originating Office Address Selection

Search: Code ▾ For: [_____] Display Cancel
Max Results: 100 ▾ Results per Page: 10 ▾

Code	Name	Address 1	Address 2	Address 3	Address 4	City	State	Zip	Coun
ACCESS BOARD	ACCESS BOARD	1331 F STREET, NW	SUITE 1000			WASHINGTON	DC	20004-1111	US
CHEMICAL SAFETY	CHEMICAL SAFETY	2175 K STREET, NW	SUITE 400			WASHINGTON	DC	20037-1809	US

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Once you see the desired code, choose it.

6. Defaults Editing Screen

Defaults Edit

Originating Office: CHEMICAL SAFETY [...]
Issue Office: [_____] [...]
Ship To Office: CHEMICAL SAFETY [...]
Mark For Office: [_____] [...]
Admin Office: ORACLE [...]
Payment Office: ARC/ASD/PRB [...]
Invoice Office: [_____] [...]

Organization CSB [...]

Submit Cancel

Click Submit to save your data.
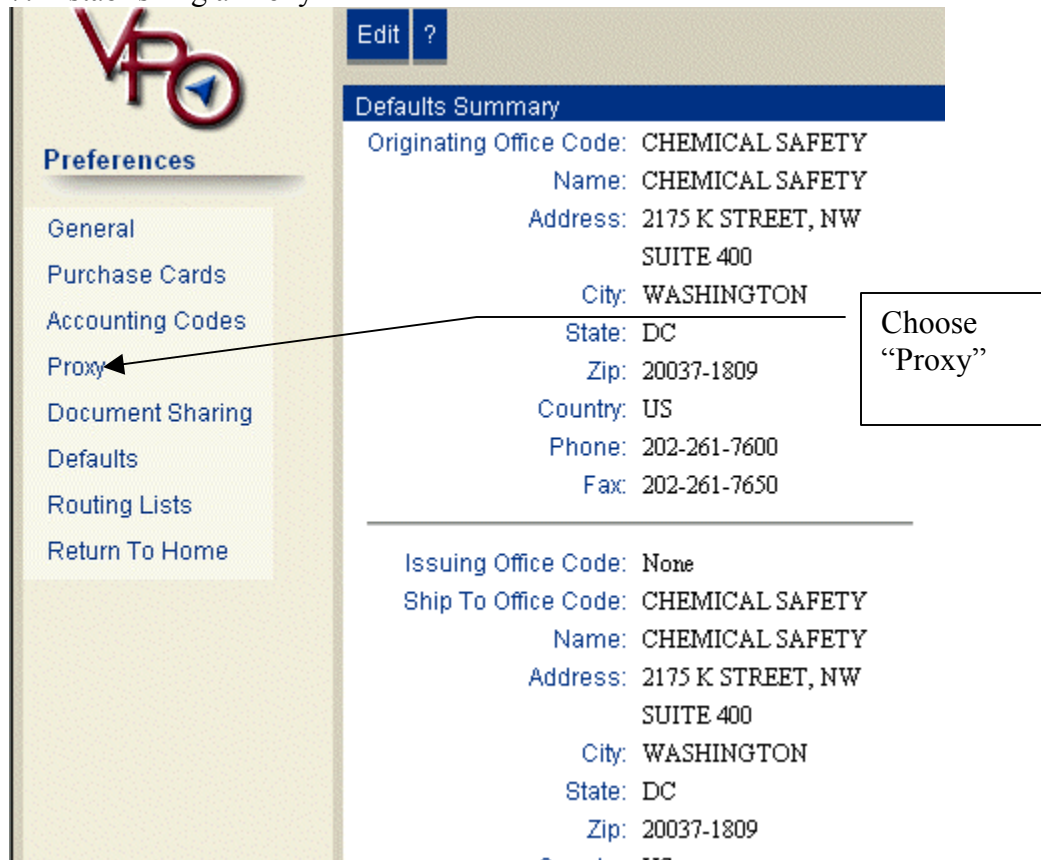
Note how the code filled in.

All these fields can be edited to be defaults.

When you have finished choosing all your defaults, click "Submit", and then go to the next page of this manual.

7. Establishing a Proxy

Edit | **?**

Defaults Summary

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Originating Office Code: CHEMICAL SAFETY
Name: CHEMICAL SAFETY
Address: 2175 K STREET, NW
SUITE 400
City: WASHINGTON
State: DC
Zip: 20037-1809
Country: US
Phone: 202-261-7600
Fax: 202-261-7650

Issuing Office Code: None
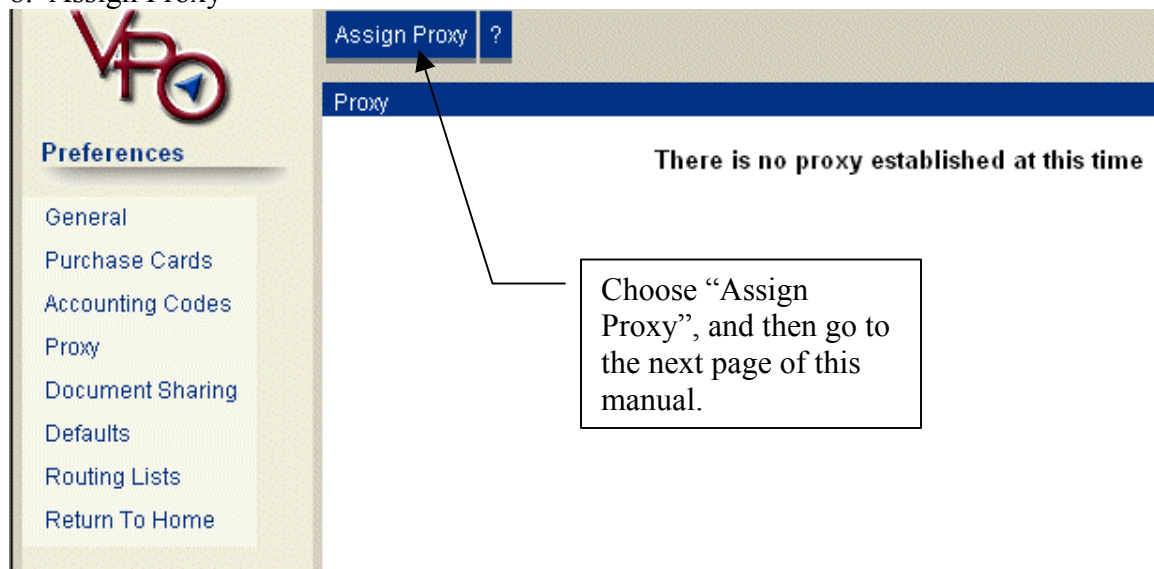Ship To Office Code: CHEMICAL SAFETY
Name: CHEMICAL SAFETY
Address: 2175 K STREET, NW
SUITE 400
City: WASHINGTON
State: DC
Zip: 20037-1809

Choose "Proxy"

8. Assign Proxy

Assign Proxy | **?**

Proxy

There is no proxy established at this time

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Choose "Assign Proxy", and then go to the next page of this manual.

9. Enter Proxy

Assign Proxy

User ID:

User Name: (None)

Email: (None)

Start Date:

End Date:

Click Submit to save your data.

Type in the user ID of the desired proxy, or use the look up feature.

10. Select the Proxy

Remember you can search for a value.

Proxy User Selection

Search: User ID | For: | Display | Cancel

Site: Current Site | Max Results: 100 | Results per Page: 10

User ID	First Name	Middle	Last Name	Site	Phone	Fax	Requisitioner	Contract Officer	Project Officer	Buy
ADBLAIR	AMY		BLAIR	SETUP BUSINESS GROUP			Y			Y
AMCNEAL	Alilia	I	McNeal	SETUP BUSINESS GROUP			Y			
BFEIRTAG	Bruce		Feirtag	SETUP BUSINESS GROUP			Y	Y	Y	Y
BKERN	BERNIE		KERN	SETUP BUSINESS GROUP			Y			Y
BSHEARS	BRIAN		SHEARS	SETUP BUSINESS GROUP			Y			Y
BWRIGHT	BETH		WRIGHT	SETUP BUSINESS GROUP			Y			Y
DBONNELL	Diana		Bonnell	SETUP BUSINESS GROUP			N			N
DHERSMAN	Deloris	J	Hersman	SETUP BUSINESS GROUP			Y			
DJARRELL	DONNA		JARRELL	SETUP BUSINESS GROUP			Y			
DKERNS	DEBBIE		KERNS	SETUP BUSINESS GROUP			Y			Y

Next | Page 1 of 5 | (48 results found)

Select the appropriate "User ID", and then go to the next page of this manual.

11. Back to the assign Proxy screen

Note how the value filled in.

12. Enter the Start and End Dates

Calendar Pop-Up

1. **Enter a Start and End Date for the Proxy,** you must have both. These are the dates the back up can act in your place.

2. Choose "Submit".

Read this, you may also use the calendar look-up feature to enter a date, just click on the icon with the smiley face next to it, and you will see the adjacent pop-up. After you have read this go to the next page of this manual.

13. The Proxy is finished.

Assign Proxy | Delete Proxy | ?

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Proxy
User ID: BFEIRTAG
User Name: Bruce Feirtag
Start Date: 04/05/2002
End Date: 04/05/2010
Email: UNKNOWN

The Proxy information has filled in.

You may assign as many Proxies as needed, or delete a Proxy if they are no longer needed, have moved departments, or are not authorized to back you up anymore.

DOCUMENT SHARING (This is the method used to give someone the same rights as yourself to all of your documents)

14. Choose Document Sharing

Edit | Change Logon Password | Change Approval Password | ?

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Menu

General Preferences Summary
User ID: TNORTHRU
Last Login: 03/11/2003 1:56:00 PM
Name: THOMAS NORTHRUP
Site ID: BPD PROCUREMENT
Password Expiration Date: 05/29/2003
Phone:
Fax:
Email: Thomas.Northrup@bpd.treas.gov

Choose "Document Sharing", and then go to the next page of this manual.

15. Click "Add Full Access"

Choose "Add Full Access" to give someone the same rights as yourself to all of your documents.

16. Search Screen

1. This dropdown box can be changed to search by other fields (i.e. last name, phone number, etc.)

2. This is the field in which to enter the search criteria. Go to the next page of this manual after you have done so.

17. Enter Search Information

User Selection

Search: [User ID ▼] For: [bf_____] [Display] [Cancel]

Options: [Current Site ▼] Max Results: [100 ▼] Results per Page: [10 ▼]

User ID	First Name	Middle	Last Name	Site
BFEIRTAG	BRUCE		FEIRTAG	BPD PROCUREMENT

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Choose "Display" after you input the search field value.

18. Select Full Access User

Preferences

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[Add Full Access] [Add Read-Only] [Delete] [?]

Document Sharing

Select	Shared Owner	Access
▶	BALLEN	Full Access
☐	RFRANCIS	Full Access
☐	BFEIRTAG	Full Access

The user magically appears, much like a dove miraculously appears from a magician's hat. Now the user is capable of the same things as you, at least in PRISM.